

# PRIVACY & SECURITY INFORMATION NOTICE

RAISING AWARENESS ABOUT THE IMPORTANCE OF PROTECTING  
THE PRIVACY & SECURITY OF SENSITIVE INFORMATION

## Verifying Client Information via Telephone

March 15, 2012

P&S Notice Number 2012-03-15

To fulfill HHSA's mission we must sometimes collect information from clients that specifically identifies an individual. We call this process "authentication". We authenticate an individual to ensure they are the person they claim to be. This is to ensure they are entitled to the benefits or services, while at the same time protecting their information from going to people who are not entitled to receive it.

We have a duty to the client to protect their information once we have it and to not share it inappropriately. Every time the client calls us, or we call the client, we must not reveal more than necessary until we have authenticated that we are talking to the person who is the subject of the information. Telephone caller ID is not a reliable source for authentication.

The following guidelines should help in the process and are based on the principles in CAO Admin Policy #0040-09-02 (pg. 4-6), "County Information Data Classification" under "Verbal". ([Click this link to view the policy](#)).

### Guidelines:

- When interacting with a client over the phone, start with the least sensitive information first to authenticate who you are talking to: "This is Sally Jones, from the County of San Diego. May I speak to Bill Smith?"
- If the person says there is no one there by that name, verify that you have dialed the correct telephone number (including area code), by asking, "Is this (XXX) XXX-XXXX?"
- If the person says the telephone number is incorrect, apologize for the inconvenience, end the call, and note the incorrect telephone number in the file. DO NOT provide any other information such as address or date of birth for the person you are trying to reach.
- If the person says the telephone number is correct, but that there is no one there by that name, apologize for the inconvenience, end the call, and note that there is no one by that name at that number. DO NOT provide any other information such as, address or date of birth for the person you are trying to reach.

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### IF YOU HAVE ANY QUESTIONS PLEASE CONTACT:

David Nelson, Privacy Officer

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